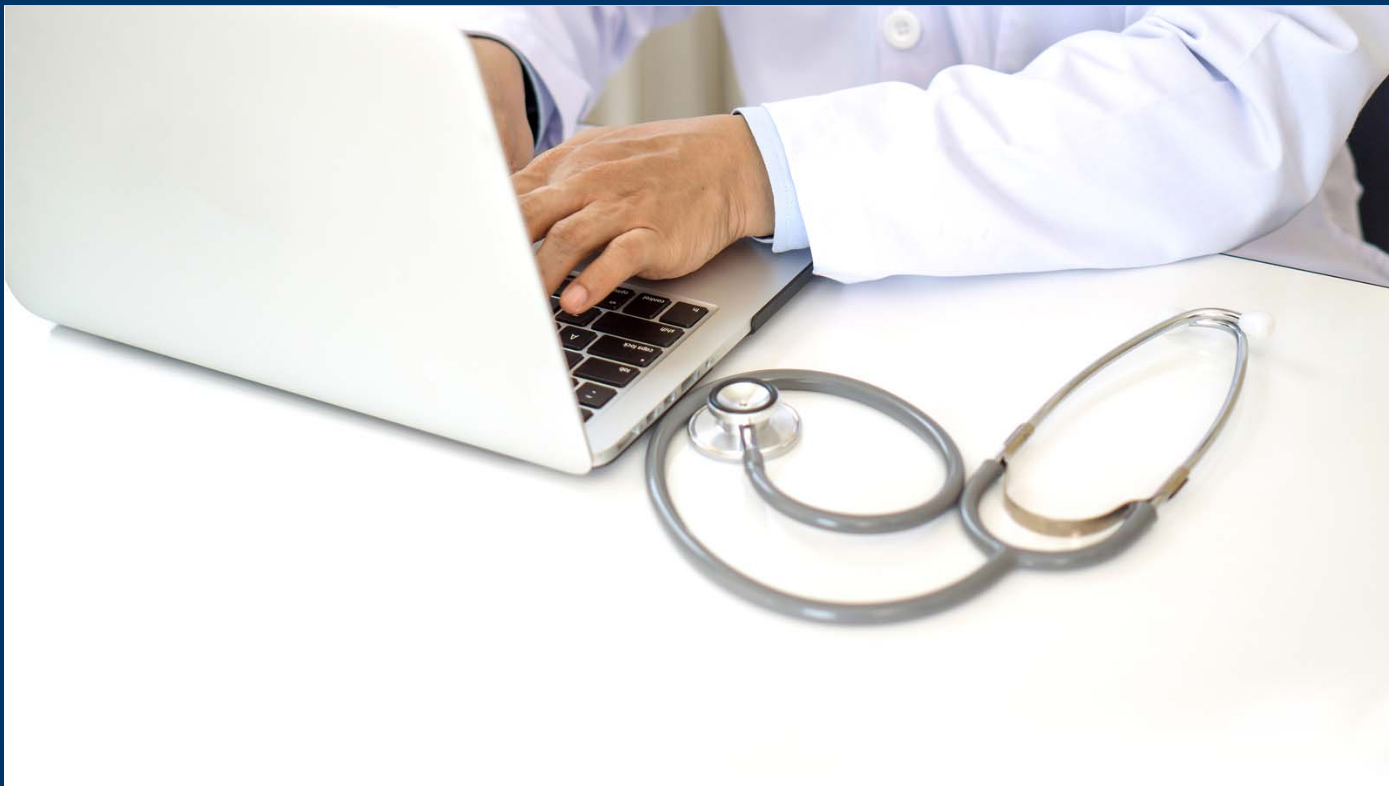


CAREWare Quick Start Guide #3

Adding Clients, Demographics, Services, and Annual Review Data

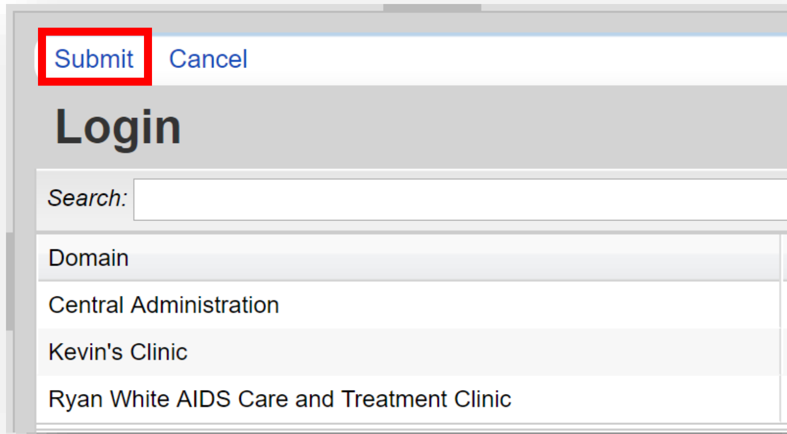
CAREWare Quick Start Guides will walk you through the basics of setting up, managing, and using the main CAREWare functions. It is intended for non-technical users who need to get basic information in and out of CAREWare.

PLEASE NOTE: The client data used in these manuals is purely fictional.

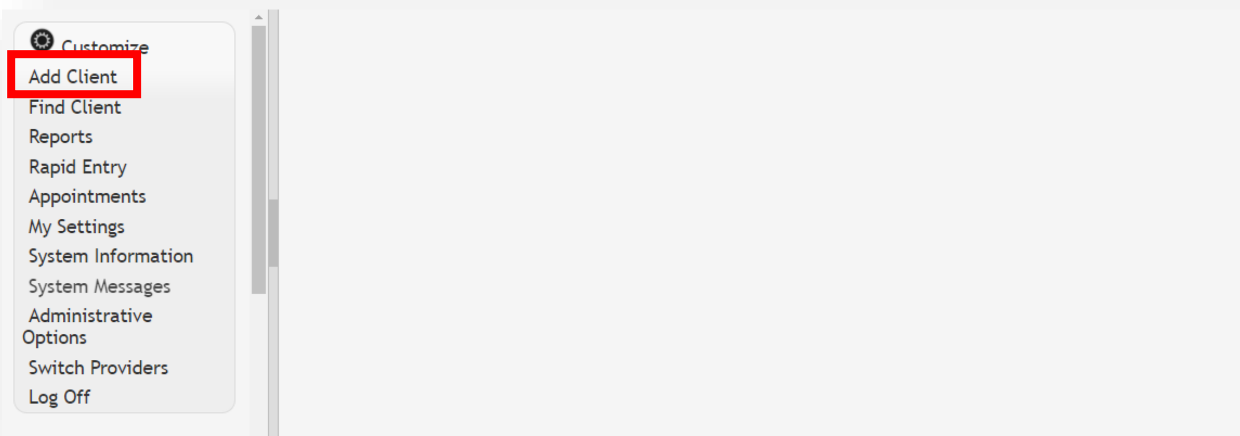
Adding Clients

1. Log in to CAREWare. If you have administrative privileges, you may see a list of several domains. If choosing between Central Administration ("Read-only") and Provider ("Default" until you change the name), log into a Provider domain.

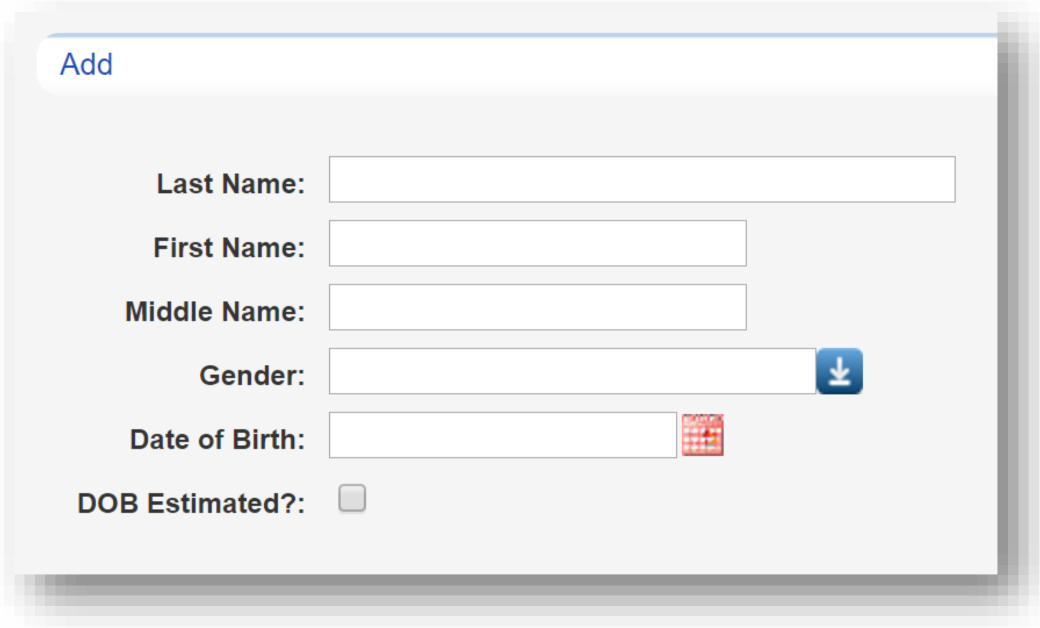
   Select a Provider domain, click **Submit** or double-click **Domain** name.



2. Select **Add Client** from the main menu and a new tab will open in your browser.



3. Enter the Last Name, First Name, Gender, and Date of Birth of the client. All fields are required, except Middle Name and the DOB Estimated checkbox (which is not advised to be used).

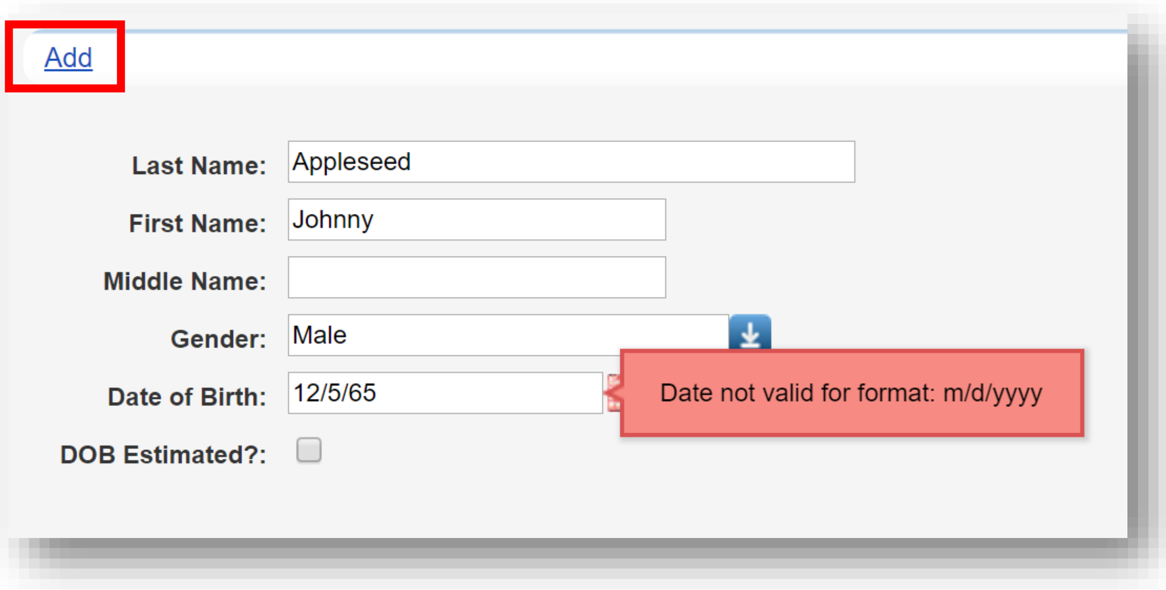


NOTE: This step is the number one source of duplicate clients and data entry errors in CAREWare. Please double check your entries here carefully before clicking the "Add Client" button!

Users should develop business rules/operating procedures outlining the method by which client names should be collected and recorded. For example:

- Enter the client's entire name as it normally appears on documentation such as a driver's license, birth certificate, passport, or Social Security card.
- Avoid using nicknames (e.g., do not use Becca if the client's first name is Rebecca).
- Avoid using initials

4. Click **Add**. If there are any invalid field formats, an alert message will appear.

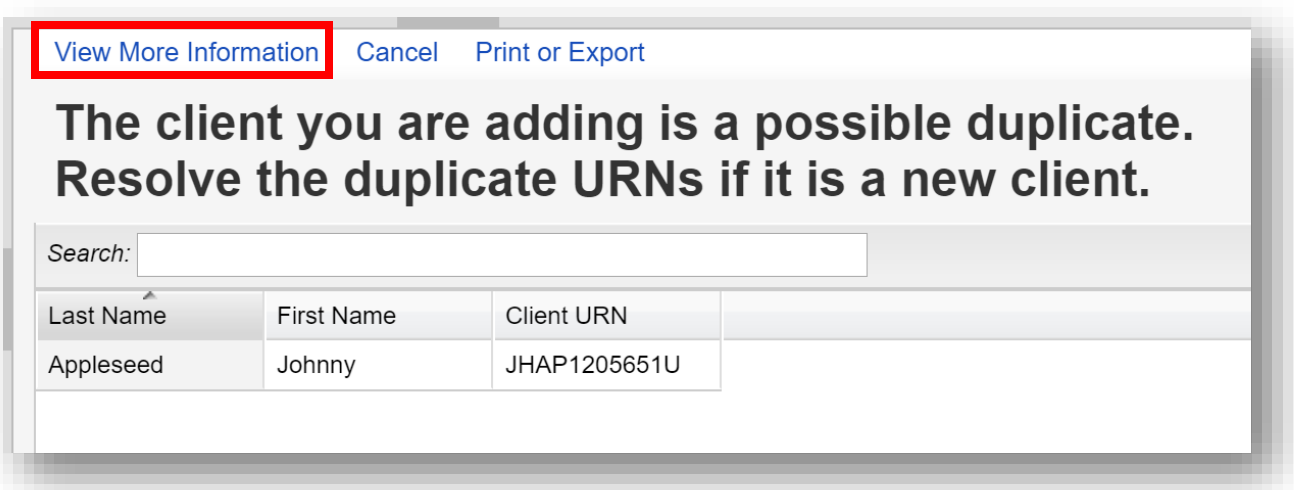


Possible Duplicate Clients

There are several scenarios where you may get a “duplicate client” message. The most common is when the client has already been entered into the system; however sometimes clients with common names may have the same birthday, so further research is needed before you proceed.

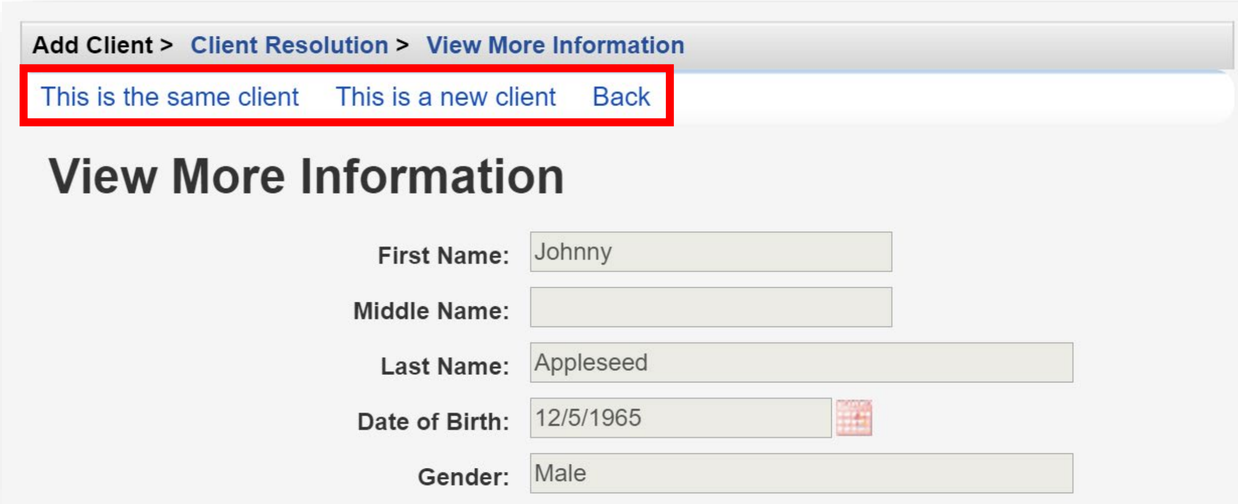
1. In the event of a conflict, after you click **Add**, you will see the message stating “The client you are adding is a possible duplicate. Resolve the duplicate URNs (Unique Record Numbers) if it is a new client.”

2. Select the client from the list and select **View More Information** to review additional client information.



3. Compare client information to determine if this is the same client.

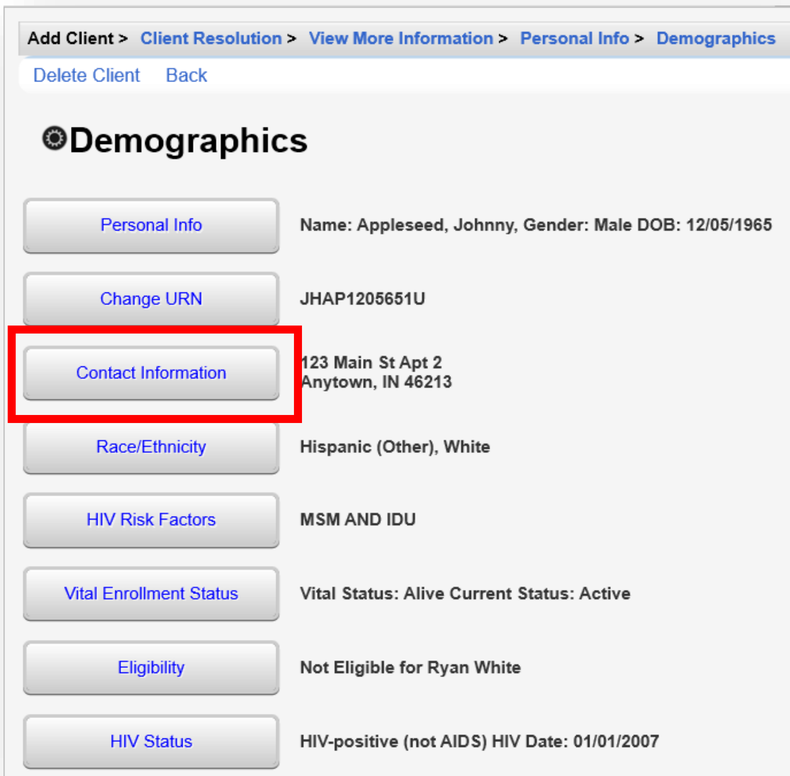
4. If it is the same person, click **This is the same client**. The existing client record will be displayed. If it's a new client, click **This is a new client**. Doing so will create a new client record. If the client matches multiple clients in the database, click **Back** and repeat step #2.



Entering Demographic Information

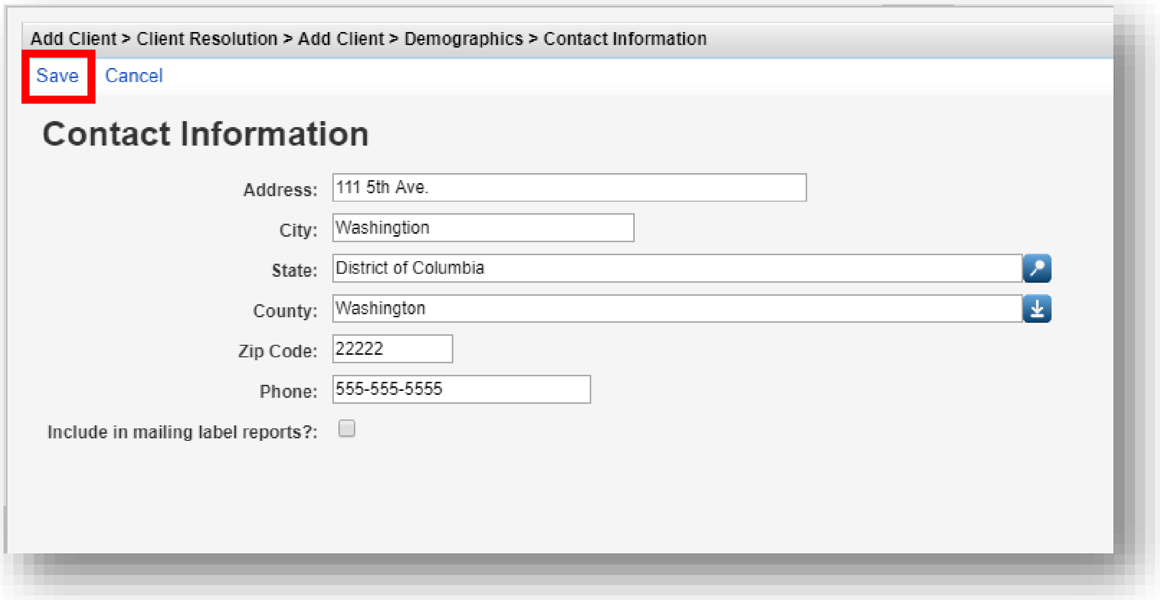
1. After you have created the client, the main Demographics screen will appear. Current client demographic values will be previewed in the Link Summary next to each section.

2. From the main Demographics screen, you can view and edit various demographic information, such as **Personal Info**, **Race/Ethnicity**, **HIV Risk Factors**, and **HIV Status**. To view/edit any of this information, click the blue link of the category you wish to view/edit. For example, to edit a client's contact information, click **Contact Information**.



If you are in a network and a client was previously entered by another clinic, you are still able to edit demographics with adequate permissions. CAREWare considers last updated data to be the most reliable.

3. The Contact Information screen now appears. Once all relevant information has been entered, click **Save**.



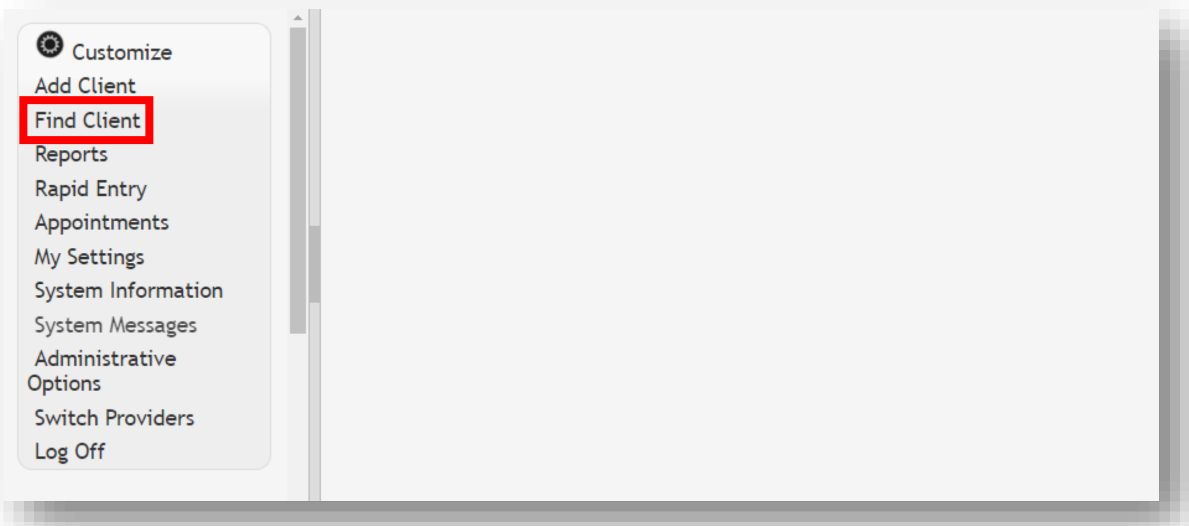
TIP: Keep in mind that updated client demographics will assist other agencies on the network and many client demographic fields are required to be reported on the RSR.

Entering Service Utilization

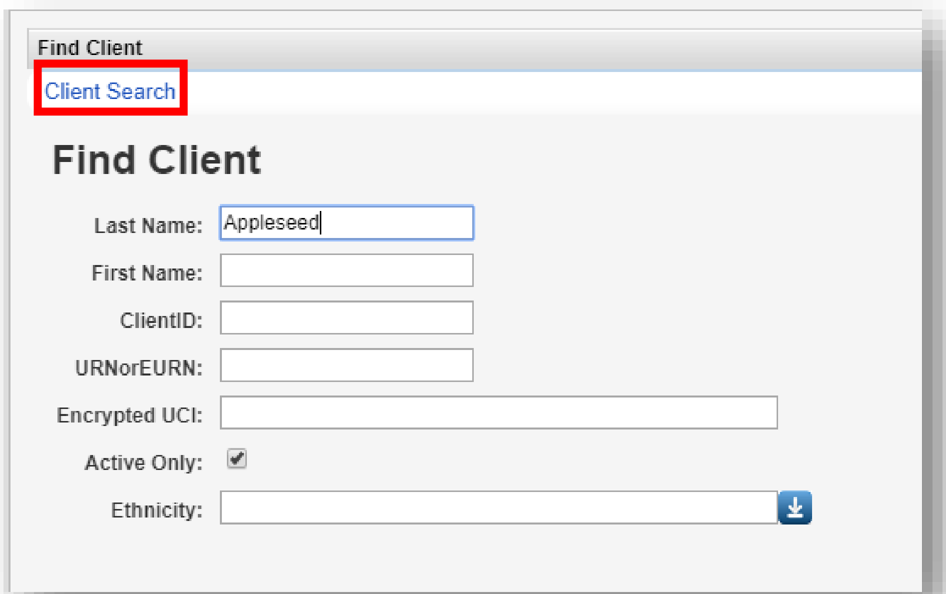
If you are entering a new client, you will be in the client screen already; skip to step 4. If you are entering services for an existing client, perform the following actions.

NOTE: You can't enter services until you've set up your contracts. Please see the Quick Start guide, "Setting up Contracts and Subservices" for more information.

1. Log into CAREWare and select **Find Client** from the main menu on the left side of the screen.

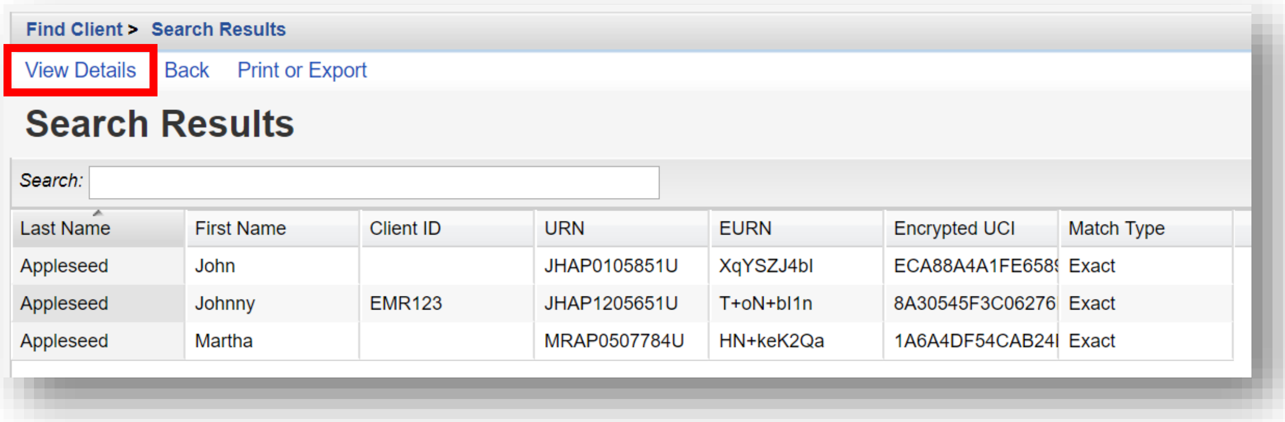


2. Search by any of the available fields; in this case we'll use the last name. Click **Client Search**.

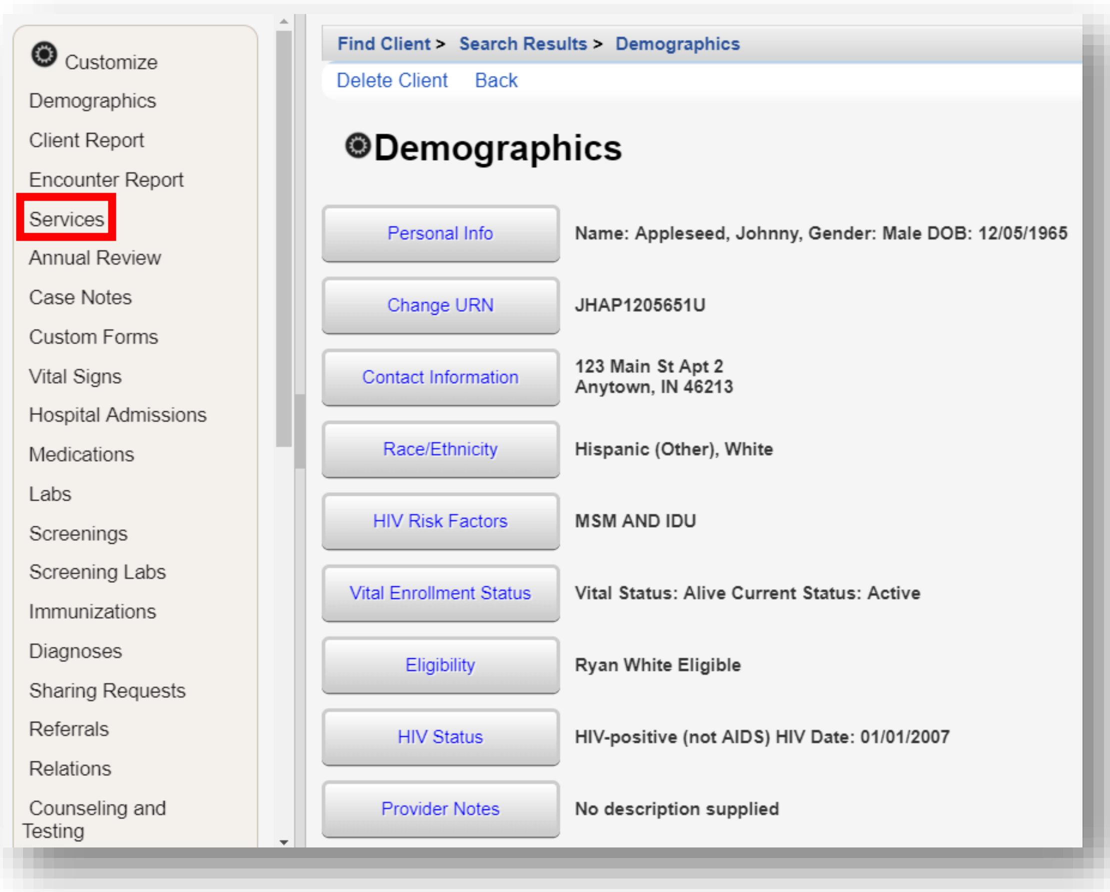


NOTE: The default is set to View Active Clients Only. Uncheck this box if you wish to search for ALL clients.

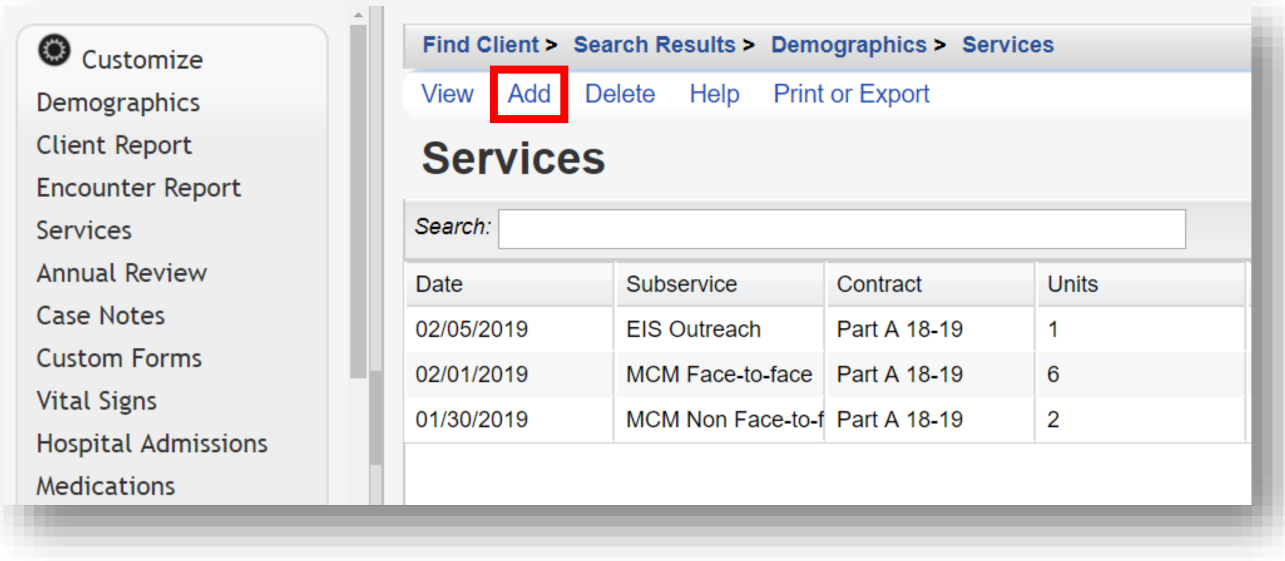
3. A list of matches to your search appears. Select the correct name from the list and click **View Details**.



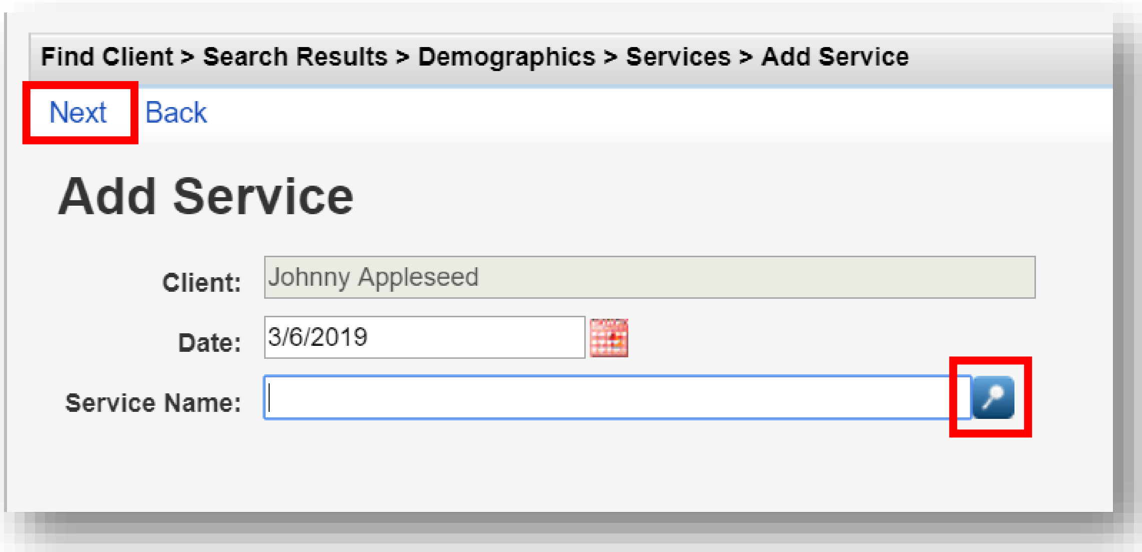
4. After clicking **View Details**, the **Demographics** screen will appear. Click **Services** from the Menu of Links.



5. The Services screen will now be displayed. Click **Add**.



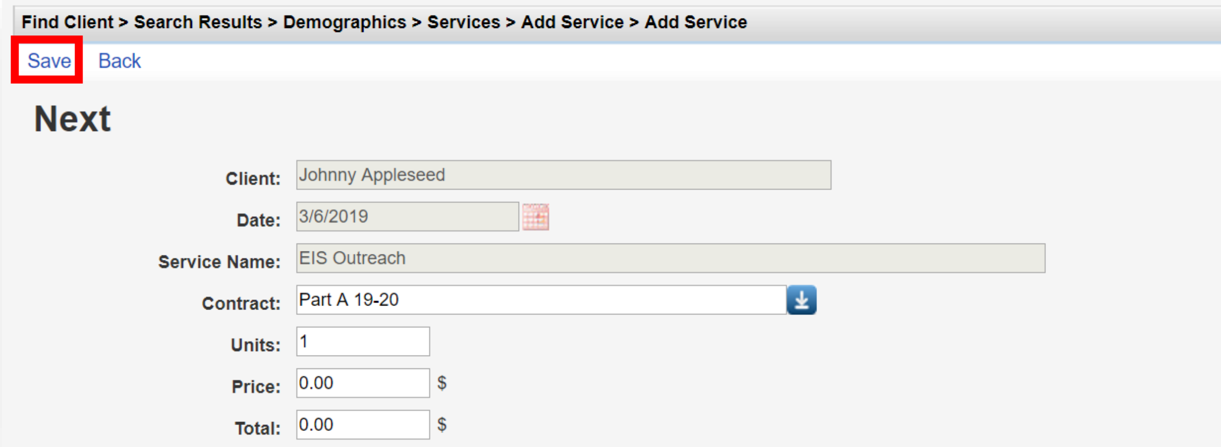
6. Select **Service Name** from the Subservice drop-down list, previously setup in CAREWare for each funded provider. Select the desired service and click **Next**.



NOTE: Only services under active contracts will be listed!

If you are looking for a service that you know is in the system but does not appear on your dropdown list, the contract may have reached its end date, or you may not have added that subservice to this specific contract. See the Quick Start Guide, "Creating Contracts and Services" for further information.

7. Enter the **Contract** for this service, and any other necessary information, such as **Units**, **Price**, and **Total**. Once complete, click **Save**.



Entering Annual Review Information

Annually, CAREWare users are required to review and update two annual review fields and one screening for all RWHAP eligible clients. These fields are:

- Housing Arrangement (found within the Annual Screenings tab)
- Insurance Assessments
- Poverty Level Assessments

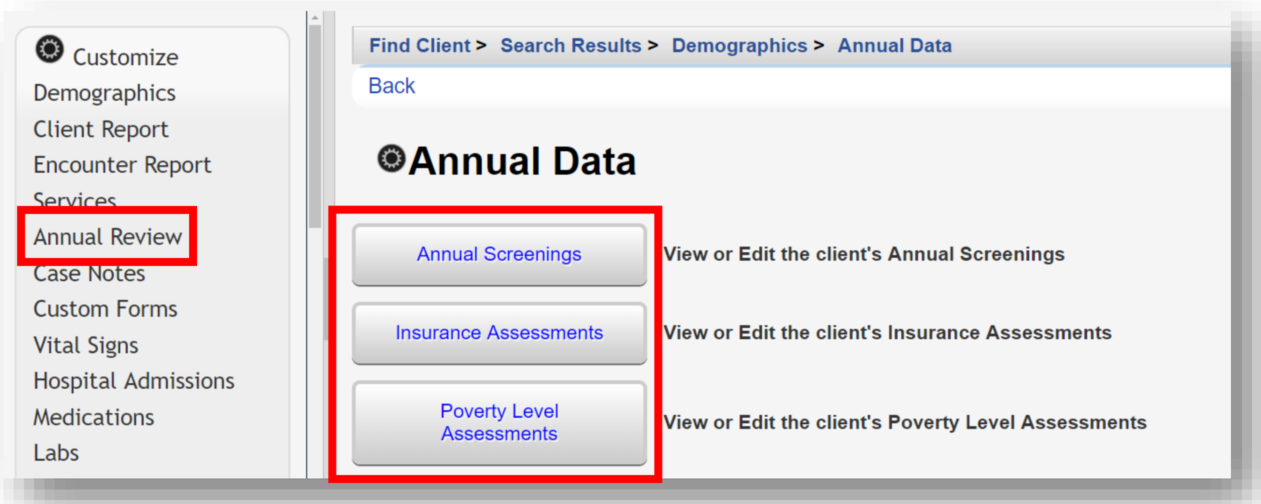
These three fields are RSR-required data elements for clients that received **ANY** service in the reporting year.

There are also three additional annual screenings (as of the 2019 RSR, these screenings are **no longer** RSR-required data elements):

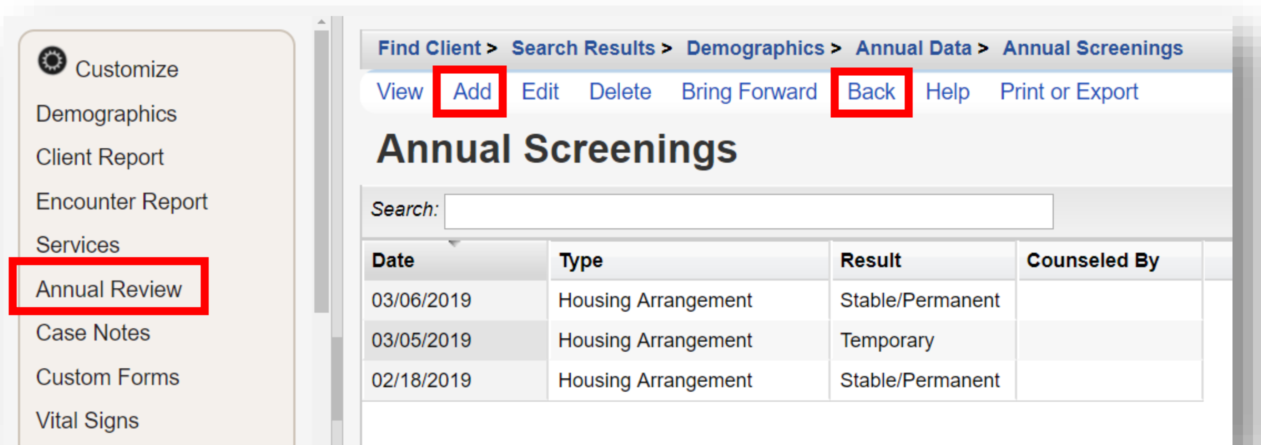
- HIV Risk Reduction Counseling
- Mental Health
- Substance Abuse

To enter the annual review data:

1. Select **Annual Review** from the menu on the left side of the screen. Select either **Annual Screenings**, **Insurance Assessments**, or **Poverty Level Assessments**.



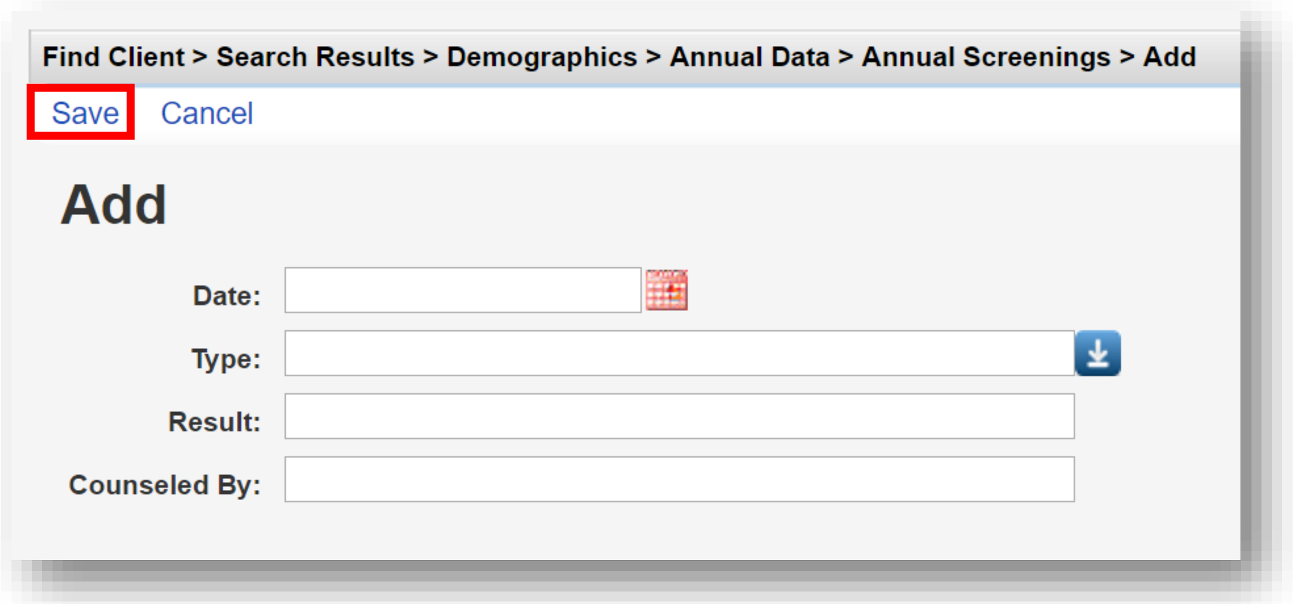
2. On the next page, click **Add**.



3. To navigate back to the Annual Data menu, click **Back** or **Annual Review** on the left side of the screen (see previous screenshot).

Annual Screenings

1. Enter **Date** and select **Type**, **Result**, and **Counseled By** (if applicable) from the drop-down lists. Once all information is entered, click **Save**.



The following **Types** are available in the drop-down list. Refer to the guidance below regarding the **Result** field:

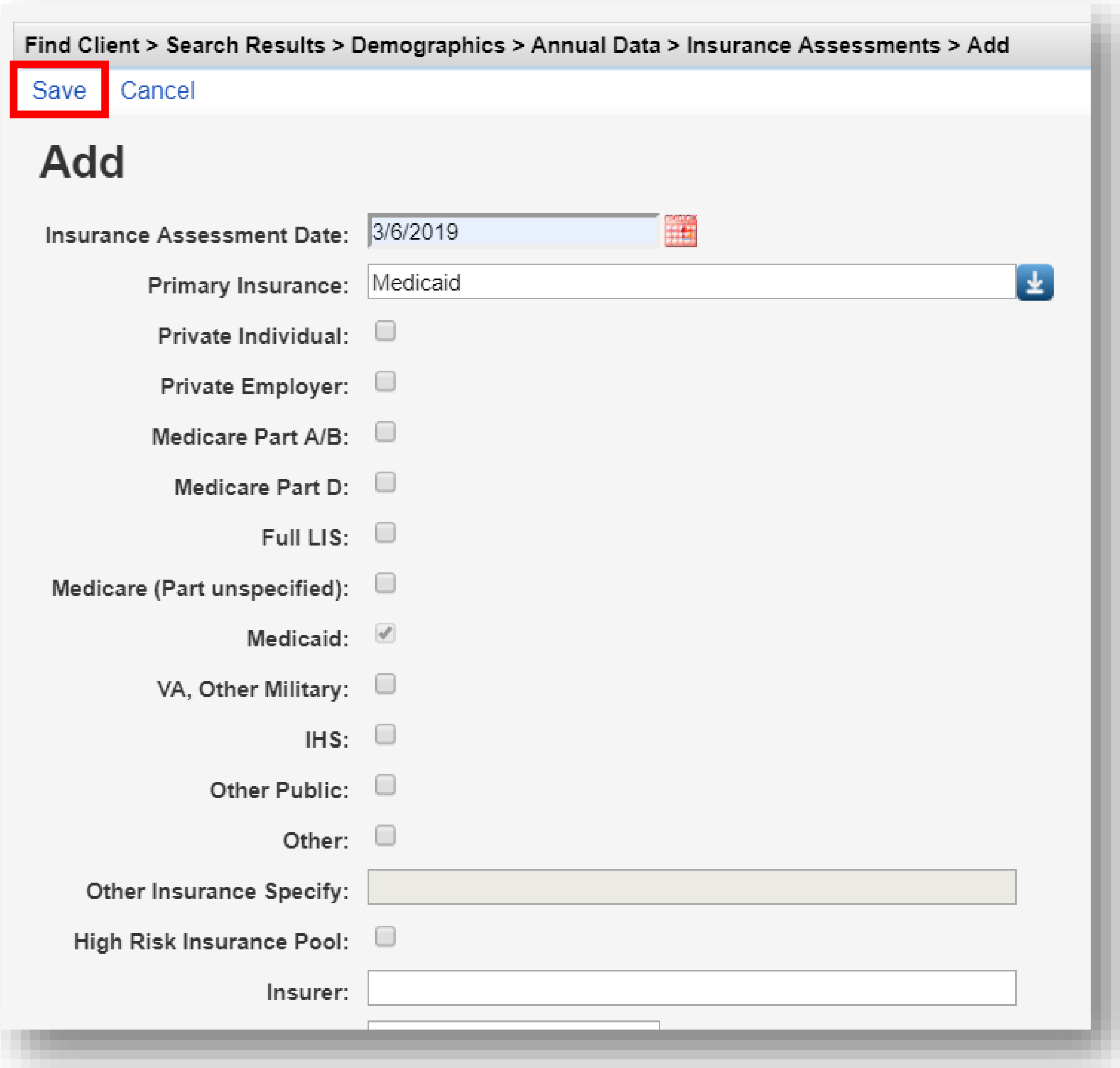
- **HIV Risk Reduction Counseling** – If the counseling has been provided, select the appropriate authorized counselor who performed it.
- **Housing Arrangement** - Please refer to HRSA guidelines to determine the difference between stable/permanent, temporary, and unstable.
- **Mental Health** – Select Yes, No, or Not Medically Indicated, if applicable.
- **Substance Abuse** – Select Yes, No, or Not Medically Indicated, if applicable.
- **HIV Primary Care** – Enter the location where the client receives their primary HIV medical care.

NOTE: Refer to the **RSR Instruction Manual** for a complete list of RSR-required data elements.

Insurance Assessments

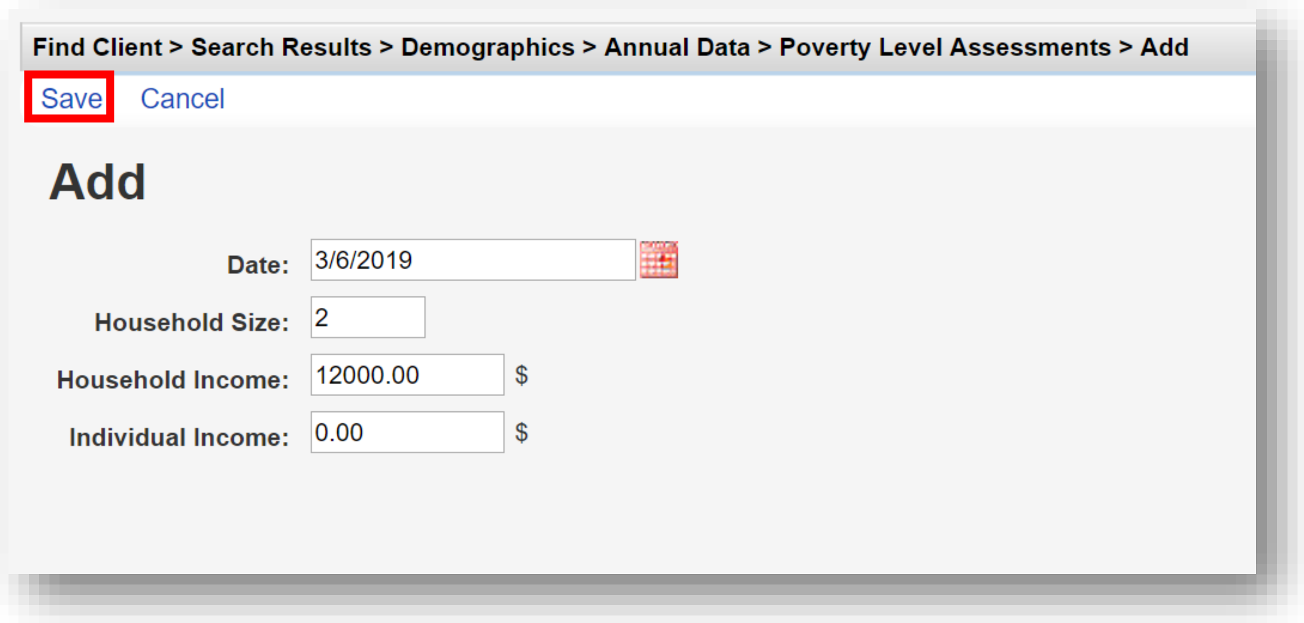
1. Enter **Insurance Assessment Date**, then select the client's **Primary Insurance** from the drop-down list. Once the value is selected from the drop-down list for primary insurance, the value will automatically be checked in the list below.

2. Select secondary insurance/other insurance using the checkboxes, as applicable. Click **Save**.



Poverty Level Assessments

1. Enter **Date, Household Size,** and **Household Income.** Note: Entry of **Individual Income** is optional. It is used in the *Cap on Charges* feature. Click **Save.**



NOTE: The Federal Poverty Level (FPL) will be calculated automatically based on Household Size and Household Income values. Figures to calculate the FPL are updated in the first quarter of each year. This will require administrators to upgrade when it becomes available, typically in mid-February or March.